

**UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION**

Washington, D.C. 20549

**Form 8-K**

**CURRENT REPORT  
Pursuant to Section 13 or 15(d) of  
The Securities Exchange Act of 1934**

Date of Report (Date of earliest event reported)

May 16, 2022

**HEALTH EQUITY, INC.**

**Delaware**  
(State or other jurisdiction of  
incorporation or organization)

**001-36568**  
(Commission File Number)

**52-2383166**  
(I.R.S. Employer  
Identification Number)

15 West Scenic Pointe Drive  
Suite 100  
Draper, Utah 84020  
(801) 727-1000

(Address, including Zip Code, and Telephone Number, including Area Code, of Registrant's Principal Executive Offices)

Not Applicable  
(Former name or former address, if changed since last report)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions (see General Instruction A.2):

- ☐ Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- ☐ Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- ☐ Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- ☐ Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of each exchange on which registered
Common stock, par value \$0.0001 per share	HQY	The NASDAQ Global Select Market

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (17 CFR §230.405) or Rule 12b-2 of the Securities Exchange Act of 1934 (17 CFR §240.12b-2).

Emerging growth company ☐

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act. ☐

## Item 7.01 Regulation FD Disclosure.

On May 16, 2022, HealthEquity, Inc. issued a press release announcing the release of its 2022 Corporate Social Responsibility Report. A copy of the press release is attached hereto as Exhibit 99.1 and is incorporated herein by reference. The 2022 Corporate Social Responsibility Report can be found at <https://health-equity.s3.amazonaws.com/downloads/HQY-2022-Corporate-Social-Responsibility-Report.pdf> and is incorporated herein by reference.

The information in this Item 7.01, including the corresponding Exhibit 99.1 and the 2022 Corporate Social Responsibility Report, is being furnished with the U.S. Securities and Exchange Commission (SEC) and shall not be deemed “filed” for purposes of Section 18 of the Securities Exchange Act of 1934, as amended.

### Forward-Looking Statements

This Form 8-K and the exhibits attached hereto and incorporated herein by reference contain “forward-looking statements” within the meaning of the “safe harbor” provisions of the Private Securities Litigation Reform Act of 1995. Forward-looking statements reflect current expectations regarding future events, results or outcomes, and are typically identified by words such as “estimate,” “project,” “predict,” “will,” “would,” “should,” “could,” “may,” “might,” “anticipate,” “plan,” “intend,” “believe,” “expect,” “aim,” “goal,” “target,” “objective,” “likely” or similar expressions that convey the prospective nature of events or outcomes. Although we believe the expectations reflected in the forward-looking statements are reasonable, we can give you no assurance these expectations will prove to be correct. Actual events, results and outcomes may differ materially from expectations due to a variety of known and unknown risks, uncertainties and other factors, including those described above. For a detailed discussion of risk factors that may impact our ability to achieve the expectations reflected in the forward-looking statements, please refer to the risks detailed in our filings with the Securities and Exchange Commission, including, without limitation, our most recent Annual Report on Form 10-K and subsequent periodic and current reports. We undertake no intention or obligation to update or revise any forward-looking statements, whether as a result of new information, future events or otherwise. Forward-looking statements should not be relied upon as representing views as of any date subsequent to the date of this Form 8-K.

## Item 9.01 Financial Statements and Exhibits

(d) Exhibits

<u>Exhibit No.</u>	<u>Description</u>
99.1	<a href="#">Press release issued by HealthEquity, Inc. on May 16, 2022</a>
104	Cover Page Interactive Data File (formatted in Inline XBRL)

## SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

Date: May 16, 2022

### HEALTHEQUITY, INC.

By: /s/ Tyson Murdock

Name: Tyson Murdock

Title: Executive Vice President and Chief Financial Officer



**HealthEquity Releases Annual Corporate Social Responsibility Report**  
*Expanded disclosure and commitment to continuous improvement*

**Draper, Utah – (GLOBE NEWSWIRE) – May 16, 2022** – HealthEquity, Inc. (NASDAQ: HQY) (“HealthEquity” or the “Company”), the nation’s largest independent health savings account (“HSA”) non-bank custodian and leading administrator of other consumer-directed benefits, today released the Company’s second annual Corporate Social Responsibility (“CSR”) Report. The CSR Report details the Company’s advances in ESG efforts and will help to inform thoughtful, measurable goals for future progress.

“Our CSR Report illustrates our commitment to transparency with our clients and members, team members, policy makers and investors,” said Jon Kessler, President and CEO of HealthEquity. “Even though this is an annual report, material ESG topics impact our decision-making almost every day. These considerations are at the center of our business.”

Beyond tracking and reporting this data, HealthEquity is committed to strengthening the Company’s ESG efforts through transparency, continual awareness building and targeted initiatives across key Company processes. The CSR Report tracks the Company’s progress in driving and attracting a more diverse and representative workforce.

“We are working to be deliberate and forward-thinking about the makeup of our team members, managers and senior leaders because we know that when workplaces are diverse, inclusive, and equitable, it spurs innovation and team members feel more fulfilled and our customers are represented,” continued Kessler. “ESG reporting helps us assess where we are and where we can continue to improve.”

In addition to sharing the results of our Materiality Assessment, the CSR Report provides disclosures for each material ESG topic by utilizing the reporting frameworks of the Global Reporting Initiative and Sustainability Accounting Standards Board (“SASB”). By leveraging recognized ESG reporting frameworks like the GRI and SASB, it ensures this information is disclosed thoughtfully and concisely.

**About HealthEquity**

HealthEquity including its subsidiaries administer Health Savings Accounts (HSAs) and other consumer-directed benefits for our more than 14 million accounts in partnership with employers, benefits advisors, and health and retirement plan providers who share our mission to connect health and wealth and value our culture of remarkable “Purple” service. For more information, visit [www.healthequity.com](http://www.healthequity.com).

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